



March 15, 2021

Mayor Tom DuBois
and Members of the City Council
City of Palo Alto
Via Irene Barragan Silipin, Recruitment Manager

Dear Mayor DuBois and Members of the City Council:

Thank you for the opportunity to once again assist you in the selection of your next City Clerk. Peckham & McKenney brings extensive experience with similar recruitments including the cities of Beverly Hills, Hayward, Long Beach, Palo Alto (2021, 2017, and 2010), Petaluma, Rancho Santa Margarita, Redwood City, Rolling Hills, San Mateo, and Walnut Creek. Our most recent placement was with the City of Mountain View in February 2021.

The recruitment process will include the placement of ads and social media postings, distribution of the Candidate Profile, and direct outreach by me to potential candidates. My initial focus will be on qualified candidates within the Bay area, but our outreach will be throughout California.

We will open the recruitment in April, and I would recommend a filing deadline of May 28. I will conduct my preliminary interviews in early June, will be prepared to provide a recommendation of the leading candidates to you in mid-June, and City's interview process will be conducted in late-June. I have attached the search timeline as well as more detailed information on each of these steps for your review.

Please feel free to call me toll-free at (866) 912-1919 if you have any questions.

Sincerely,

Bobbi

Bobbi C. Peckham, President
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This proposal to engage Peckham & McKinney and to authorize an executive search for a new City Clerk is not a project under the California Environmental Quality Act (CEQA).

Attachments:

- Attachment A - Peckham & McKinney Proposal Dated March 15, 2021

THE SEARCH PROCESS

Development of Candidate Profile – This step provides for the development of the Candidate Profile that will serve as a guide in the identification of potential candidates, outreach and recruitment efforts, screening and selection of your next City Clerk. The Candidate Profile includes information relating to the City of Palo Alto; current and future issues and opportunities; expectations, goals, and objectives leading to the success of the new City Clerk; and the background and experience, leadership style, skills and abilities, and personality traits of the ideal candidate.

We will request information relating to compensation and benefits, organization charts, and budget data. In addition, we will request high-resolution photos to be used in an attractive brochure to market the opportunity.

A draft of the Candidate Profile will be provided to the Council Subcommittee for review. We ask that all revisions and corrections be provided to us in a timely manner in order to maintain the agreed-upon search timeline. Our marketing and design professional will then prepare an attractive marketing brochure incorporating the Candidate Profile. This brochure will be distributed to identified industry professionals, and it will also be available on our firm's web site. Copies of the brochure will also be made available to the City.

Advertisements will be placed in the appropriate industry publications and websites, and our firm will assume responsibility for presenting your opportunity in an accurate and professional manner. Social media, including LinkedIn and other venues, will be used as appropriate. Full information on the position will be posted on the Peckham & McKenney website and provided to the City for posting as well.

Recruitment – The main focus of our outreach will be direct phone contact with quality potential candidates. Our recruiting efforts will focus on direct and aggressive recruiting of individuals within the search parameters established during the Candidate Profile Development.

Throughout this active search process, we will regularly update the City of the recruitment status and share questions, concerns, and comments received from potential candidates as they consider the opportunity. By doing so, we will “team” with the City to ensure that all issues and concerns of candidates are discussed and understood thereby eliminating “surprises” once the resume filing deadline has occurred.

As resumes are received, they will be promptly acknowledged within 48 hours, and we will personally respond to all inquiries. Once the resume filing deadline has passed, we will update the City on the status of the recruitment, the number of resumes received, and our intent for preliminary interviews.

Preliminary Interviews – Upon our review of the resumes received, supplemental questionnaires will be sent to candidates who appear to meet the Candidate Profile. Following a thorough review of the supplemental questionnaires, we will conduct preliminary interviews with those individuals most closely matching the Candidate Profile. Internet research will also be conducted so that we may probe the candidate regarding any areas of concern. Candidates will be advised of the search schedule and updated regularly as to their status.

Recommendation of Candidates/Selection of Finalists – A report will be provided to the Mayor and City Council prior to our meeting to discuss our recommendation of leading candidates. This report will include a full listing of all candidates who applied for the position, as well as the cover letters, resumes, and supplemental questionnaires of the recommended group of candidates for further consideration.

Ms. Peckham will meet with the City Council in a one- to two-hour meeting and will provide an overview of each recommended candidate as well as share any concerns or negative information. Once a group of finalists has been selected by the City Council, finalists will be notified and provided with all necessary information to attend finalist interviews with the City. Peckham & McKenney will notify all candidates of their status.

If necessary, finalists will make their own travel plans and reservations. It is customary that the City reimburse finalists for round-trip airfare, car rental, and lodging necessary to attend the interviews with the City. We will confirm this with the City Council at our meeting to recommend candidates.

Finalist Interview Process – We will provide facilitation during the finalist interview process. An orientation session will be held at the beginning of the process, and we will facilitate a review and discussion of the finalists at the end of the day. Interview materials, including suggested interview questions, evaluation and ranking sheets will be provided. Again, a standard finalist interview process of the leading four to eight candidates is typically conducted within one day. Should the process desired by the City require more than one day, an additional fee will be charged.

(Second Round) – Ms. Peckham will provide any necessary facilitation during this second round of interviews with the leading two to three finalists. Typically, these interviews provide more in-depth, informal conversations that will ultimately lead to the selection of a finalist candidate.

Qualification – Once the finalist candidate has been selected and a conditional offer has been made by the City of Palo Alto, a thorough background check will be conducted that is compliant with the Fair Credit Reporting Act and Investigative Consumer Reporting Agencies Act. Peckham & McKenney utilizes the services of Sterling Talent Solutions (www.sterlingtalentsolutions.ca), the world's largest company focused entirely on conducting background checks. This investigation will verify professional work experience; degree verification; certifications; and criminal, civil, credit, and motor vehicle records. We encourage our clients to consider further vetting the candidate through a Department of Justice LiveScan (California clients) in order to ensure that all known criminal history records (beyond seven years) are investigated.

Ms. Peckham will also contact professional references, and a full report will be provided. This comprehensive process ensures that only the most thoroughly screened candidate is hired. In addition, negotiation assistance will be provided as requested by the City of Palo Alto.

SEARCH SCHEDULE

ACTIVITY

- I. Project Organization
 - Conference call discussion of recruitment process
 - Formalize project schedule
- II. Development of Candidate Profile
 - Develop Candidate Profile/Marketing Brochure and obtain approval
 - Develop advertising and recruiting plan
- III. Recruitment
 - Advertise, network, and electronically post in appropriate venues
 - Distribute candidate profile to identified industry professionals
 - Post opportunity on firm's website
 - Focused outreach to individuals within the parameters of the Candidate Profile
 - Respond to all inquiries and acknowledge all resumes received within 48 hours
- IV. Preliminary Interviews
 - Screen resumes and conduct Internet research
 - Identify leading candidates and request supplemental questionnaires
 - Review supplemental questionnaires
 - Conduct preliminary interviews with leading candidates
- V. Recommendation of Candidates/Selection of Finalists
 - Provide written recommendation of candidates to the City Council
 - Meeting to provide overview of recommended candidates
 - City Council selects finalist candidates for finalist interview process
 - Peckham & McKenney notifies all candidates of status in recruitment process
- VI. Finalist Interview Process
 - Facilitate finalist interviews with the City Council
 - Assist City throughout process and provide recommendations
 - City Council selects candidate or leading 2-3 candidates for further consideration
 - City Council conducts second interview process.
- VII. Qualification
 - Conduct thorough background and reference checks on leading candidate
 - Provide negotiation assistance
 - Exceed expectations and successfully place candidate who "fits."

COST OF SERVICES

Cost of Services

Our all-inclusive fee to conduct the search process for your next City Clerk is \$27,000. The all-inclusive fee includes professional fees and expenses (out-of-pocket costs associated with advertising, consultant travel, administrative support/printing/copying/postage/materials, telephone/technology, partial background checks on recommended candidates, and full background check on selected finalist only).

Additional Service Costs

The following "menu" details fees for additional requested services. Some fees may be negotiated.

Additional meeting day	\$500 - 1,000/each + travel expenses
Each additional full background check	\$300/each
Additional placement within organization*	\$5,000 (if selected within one year)

*If the City of Palo Alto hires an additional candidate from among those recommended for another position within one year of the close of the recruitment, a fee of \$5,000 will be charged to the City.

Process of Payment

One-third of the all-inclusive fee is due as a retainer upon execution of the agreement. This retainer covers upfront and necessary expenses incurred by Peckham & McKenney on the City's behalf for advertising and printing. If the retainer is not received by Peckham & McKenney within 30 days of execution of the agreement, we will suspend the recruitment process until payment is received.

The second third of the full payment will be invoiced one month from contract execution, and it is due within 30 days following the invoice date. The final third of the full payment will be invoiced two months from contract execution, and it is due within 30 days following the invoice date.

If the City requires a different payment schedule, this must be agreed upon within the contract. Peckham & McKenney expects payment of all invoices in a timely manner.

Insurance

Peckham & McKenney carries Professional Liability Insurance (\$1,000,000 limit), Commercial General Liability Insurance (\$2,000,000 General Liability, and \$4,000,000 Products) and Automobile Liability Insurance (\$1,000,000). Our Insurance Broker is Wells Fargo Insurance, Inc., Charlotte, NC, and coverage is provided by Sentinel Insurance Company and Hiscox Insurance Co. Limited. Necessary insurance documentation will be provided to the City in a timely manner.

Placement Guarantee

Our placement record is particularly strong in that 89% of the candidates we have placed remain in those positions for over five years. In the unlikely event, however, that a candidate recommended by our firm (external candidates only) leaves your employment *for any reason within the first year* (except in the event of budgetary cutbacks, promotion, position elimination, or illness/death), we agree to provide a one-time replacement at no additional charge, except expenses.

Reopening the Recruitment

Throughout the recruitment process, all of our efforts are made to ensure a successful placement of a candidate who fits the Candidate Profile. It is extremely rare that our recruitment process fails to produce a preferred candidate in the first instance. If the search process, however, does not produce a successful placement, and there is an understanding that the City of Palo Alto and Peckham & McKenney each take responsibility for

whatever errors may have been made, we will conduct a second recruitment process for the cost of expenses only (approximately \$7,500).

As Albert Einstein said, the definition of insanity is "doing the same thing over and over again and expecting different results." Prior to reopening the recruitment again, we will thoroughly review with the City what adjustments in approach, compensation, or other variables may be necessary to ensure a successful outcome.

